

*2016 Income Tax Organizer  
Expatriate Supplement*

*Powers & Company  
PO Box 882  
Mahopac, NY 10541  
Telephone: 845-803-8753  
Fax: 845-803-8759*

[www.tax-power.com](http://www.tax-power.com)

Reproduction of any of the attached material without the expressed written consent of Powers & Company is prohibited. Any violations will be prosecuted to the fullest extent of the law. 2016 Income Tax Questionnaire-Expatriate Supplement

# Powers & Company

## 2016 Expatriate Tax Organizer Supplement

Please complete a separate supplement for each spouse  
General Information (Please Print)

Taxpayer: \_\_\_\_\_

First Name                      Mid. Init.                      Last Name                      Social Sec. Number

Foreign Address: \_\_\_\_\_

Enter country of citizenship \_\_\_\_\_

Type of entry Visa \_\_\_\_\_

Visa Number \_\_\_\_\_

Does your Visa limit your stay in the foreign country? \_\_\_\_\_

List contractual terms relating to your stay in the foreign country.

Did you maintain a home in the US while abroad? \_\_\_\_\_

If yes, was it rented? \_\_\_\_\_

Enter address in the US, the names of any tenants and any relationship. \_\_\_\_\_

Employer's Name: \_\_\_\_\_

Employer's U.S. address: \_\_\_\_\_

Employer's Foreign address: \_\_\_\_\_

Employer is:     Self                       Foreign entity  
                   U.S. Company     Foreign affiliate of U.S. company

Have you ever excluded foreign income in the past? \_\_\_\_\_

If yes, enter years \_\_\_\_\_

Foreign Residence Information (Please Print)

Date your foreign residence began \_\_\_\_\_

Does your family live abroad with you? \_\_\_\_\_

If yes, enter period \_\_\_\_\_

Do you maintain a separate foreign residence for your family due to adverse living conditions? \_\_\_\_\_

If Yes, enter city and country where family resides \_\_\_\_\_

Enter type of living quarters you maintain (ie. Rented room or home, purchased home, quarters provided by employer) \_\_\_\_\_

Are you subject to tax in the foreign country? \_\_\_\_\_

If yes, provide a list of dates and amounts paid during the year.

If no, have you provided a statement to the foreign tax authorities that you are not a resident of that country? \_\_\_\_\_

Please describe what steps that you have taken to relinquish your abode in the U.S. as pursuant to IRC Section 911(d)(3) a U.S. person who's abode is in the U.S. cannot have a foreign tax home and therefore may not exclude foreign earned income. Note that abode means basically where your primary residence exists, For example if you live in Michigan and commute to a job in Canada daily, your tax home (even though in a foreign country) is deemed to be in the U.S.

# Powers & Company

## 2016 Expatriate Tax Organizer Supplement

Please complete a separate supplement for each spouse

### Qualifying Earnings and Days Information (Please Print)

#### US EARNED INCOME

List all days spent in the U.S. in Year 2016 and amounts earned while in the U.S.

Note: a partial day in the U.S. is counted as a full day in the U.S.

Dates arrived in the US	Dates left US	Number of days in the US total	Number of US days on business	Income Earned while in the US (attach computation)
-------------------------	---------------	--------------------------------	-------------------------------	----------------------------------------------------

_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

#### FOREIGN PHYSICAL PRESENCE

List all countries in which you were physically present beginning January 1, 2015-2017 through the time that this questionnaire is completed. Please list all foreign travel beginning when you first left the U.S. Attach a separate schedule if necessary.

Country	Date arrived	Date departed	Number of full days in country	Number of days on business	Income Earned (attach computation)
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Total wages, salary, bonuses, commissions, etc. earned in 2016 in a foreign country US\$ \_\_\_\_\_. The maximum foreign earned income exclusion for 2015 is \$100,800.

List all employee allowances and reimbursed expenses received (COLA, home leave, housing, education, etc.):

Description	Amount (USD)
_____	_____
_____	_____
_____	_____

List all non cash compensation (home, meals, auto, etc):

Description	Amount (USD)
_____	_____
_____	_____
_____	_____

